

SCANNED

DATE 2-8-04

CMB

UNITED STATES DISTRICT COURT  
DISTRICT OF MASSACHUSETTS

BRUCE RIGGS, Individually, and on Behalf of  
All Others Similarly Situated,

Plaintiff,

vs.

MASSACHUSETTS FINANCIAL SERVICES  
COMPANY, MFS INVESTMENT  
MANAGEMENT, SUN LIFE FINANCIAL, INC.,  
MFS SERIES TRUST I, MFS SERIES TRUST II,  
MFS SERIES TRUST III, MFS SERIES TRUST IV,  
MFS SERIES TRUST V, MFS SERIES TRUST VI,  
MFS SERIES TRUST VII, MFS SERIES TRUST  
VIII, MFS SERIES TRUST IX, MFS SERIES  
TRUST X, MFS SERIES TRUST XI, MFS  
CAPITAL OPPORTUNITIES FUND, MFS CORE  
GROWTH FUND, MFS LARGE CAP GROWTH  
FUND, MFS MANAGED SECTORS FUND, MFS  
MID CAP GROWTH FUND, MFS NEW  
DISCOVERY FUND, MFS NEW ENDEAVOR  
FUND, MFS RESEARCH FUND, MFS  
STRATEGIC GROWTH FUND, MFS  
TECHNOLOGY FUND, MASSACHUSETTS  
INVESTORS GROWTH STOCK, MFS MID CAP  
VALUE FUND, MFS RESEARCH GROWTH  
AND INCOME FUND, MFS TOTAL RETURN  
FUND, MFS UNION STANDARD EQUITY FUND,  
MFS UTILITIES FUND, MFS VALUE FUND,

Civ. No. 03 CV 12500 (WGY)

[Caption continued on next page]

**DECLARATION OF DAVID PASTOR IN SUPPORT OF THE MOTION OF ROBERT  
K. WILLMS FOR CONSOLIDATION, APPOINTMENT AS LEAD PLAINTIFF, AND  
FOR APPROVAL OF SELECTION OF LEAD AND LIAISON COUNSEL**

MASSACHUSETTS INVESTORS TRUST, MFS :  
AGGRESSIVE GROWTH ALLOCATION FUND, :  
MFS CONSERVATIVE ALLOCATION FUND, :  
MFS MODERATE ALLOCATION FUND, MFS :  
BOND FUND, MFS EMERGING MARKETS :  
DEBT FUND, MFS GOVERNMENTAL :  
LIMITED MATURITY FUND, MFS :  
GOVERNMENT MORTGAGE FUND, MFS :  
GOVERNMENT SECURITIES FUND, MFS :  
HIGH INCOME FUND, MFS HIGH YIELD :  
OPPORTUNITIES FUND, BOND FUND, MFS :  
LIMITED MATURITY FUND, MFS RESEARCH :  
BOND FUND, MFS STRATEGIC INCOME FUND, :  
MFS ALABAMA MUNICIPAL BOND FUND, :  
MFS ARKANSAS MUNICIPAL BOND FUND, :  
MFS CALIFORNIA MUNICIPAL BOND FUND, :  
MFS FLORIDA MUNICIPAL BOND FUND, MFS :  
GEORGIA MUNICIPAL BOND FUND, MFS :  
MARYLAND MUNICIPAL BOND FUND, MFS :  
MASSACHUSETTS MUNICIPAL BOND FUND, :  
MFS MISSISSIPPI MUNICIPAL BOND FUND, :  
MFS MUNICIPAL BOND FUND, MFS :  
MUNICIPAL LIMITED MATURITY FUND, :  
MFS NEW YORK MUNICIPAL BOND FUND, :  
MFS NORTH CAROLINA MUNICIPAL BOND :  
FUND, MFS PENNSYLVANIA MUNICIPAL :  
BOND FUND, MFS SOUTH CAROLINA :  
MUNICIPAL BOND FUND, MFS TENNESSEE :  
MUNICIPAL BOND FUND, MFS VIRGINIA :  
MUNICIPAL BOND FUND, MFS WEST :  
VIRGINIA MUNICIPAL BOND FUND, MFS :  
EMERGING MARKETS EQUITY FUND, MFS :  
GLOBAL EQUITY FUND, MFS GLOBAL :  
GROWTH FUND, MFS GLOBAL TOTAL :  
RETURN FUND, MFS INTERNATIONAL :  
GROWTH FUND, MFS INTERNATIONAL :  
NEW DISCOVERY FUND, MFS :  
INTERNATIONAL VALUE FUND, MFS :  
RESEARCH INTERNATIONAL FUND, MFS :  
SERIES TRUST VII and ALL DEFENDANTS, :  
:

Defendants. :

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[Additional Captions Set Forth Below]

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OLIVER S. TRONE, Individually, and on Behalf of  
All Others Similarly Situated,

Plaintiff,

vs.

Civ. No. 03 CV 12514 (WGY)

MFS CAPITAL OPPORTUNITIES FUND, MFS  
CORE GROWTH FUND, MFS LARGE CAP  
GROWTH FUND, MFS MANAGED SECTORS  
FUND, MFS MID CAP GROWTH FUND, MFS  
NEW DISCOVERY FUND, MFS NEW  
ENDEAVOR FUND, MFS RESEARCH FUND,  
MFS STRATEGIC GROWTH FUND, MFS  
TECHNOLOGY FUND, MASSACHUSETTS  
INVESTORS GROWTH STOCK, MFS MID CAP  
VALUE FUND, MFS RESEARCH GROWTH  
AND INCOME FUND, MFS TOTAL RETURN  
FUND, MFS UNION STANDARD EQUITY FUND,  
MFS UTILITIES FUND, MFS VALUE FUND,  
MASSACHUSETTS INVESTORS TRUST, MFS  
AGGRESSIVE GROWTH ALLOCATION FUND,  
MFS CONSERVATIVE ALLOCATION FUND,  
MFS MODERATE ALLOCATION FUND, MFS  
BOND FUND, MFS EMERGING MARKETS  
DEBT FUND, MFS GOVERNMENTAL  
LIMITED MATURITY FUND, MFS  
GOVERNMENT MORTGAGE FUND, MFS  
GOVERNMENT SECURITIES FUND, MFS  
HIGH INCOME FUND, MFS HIGH YIELD  
OPPORTUNITIES FUND, BOND FUND, MFS  
LIMITED MATURITY FUND, MFS RESEARCH  
BOND FUND, MFS STRATEGIC INCOME FUND,  
MFS ALABAMA MUNICIPAL BOND FUND,  
MFS ARKANSAS MUNICIPAL BOND FUND,  
MFS CALIFORNIA MUNICIPAL BOND FUND,  
MFS FLORIDA MUNICIPAL BOND FUND, MFS  
GEORGIA MUNICIPAL BOND FUND, MFS

MARYLAND MUNICIPAL BOND FUND, MFS :  
 MASSACHUSETTS MUNICIPAL BOND FUND, :  
 MFS MISSISSIPPI MUNICIPAL BOND FUND, :  
 MFS MUNICIPAL BOND FUND, MFS :  
 MUNICIPAL LIMITED MATURITY FUND, :  
 MFS NEW YORK MUNICIPAL BOND FUND, :  
 MFS NORTH CAROLINA MUNICIPAL BOND :  
 FUND, MFS PENNSYLVANIA MUNICIPAL :  
 BOND FUND, MFS SOUTH CAROLINA :  
 MUNICIPAL BOND FUND, MFS TENNESSEE :  
 MUNICIPAL BOND FUND, MFS VIRGINIA :  
 MUNICIPAL BOND FUND, MFS WEST :  
 VIRGINIA MUNICIPAL BOND FUND, MFS :  
 EMERGING MARKETS EQUITY FUND, MFS :  
 GLOBAL EQUITY FUND, MFS GLOBAL :  
 GROWTH FUND, MFS GLOBAL TOTAL :  
 RETURN FUND, MFS INTERNATIONAL :  
 GROWTH FUND, MFS INTERNATIONAL :  
 NEW DISCOVERY FUND, MFS :  
 INTERNATIONAL VALUE FUND, MFS :  
 RESEARCH INTERNATIONAL FUND, MFS :  
 CASH RESERVE FUND, MFS GOVERNMENT :  
 MONEY MARKET FUND, MFS MONEY :  
 MARKET FUND, MFS MUNICIPAL SERIES :  
 TRUST, MFS SERIES TRUST I, MFS SERIES :  
 TRUST II, MFS SERIES TRUST III, MFS SERIES :  
 TRUST IV, MFS SERIES TRUST V, MFS SERIES :  
 TRUST VI, MFS SERIES TRUST VII, MFS SERIES :  
 TRUST VIII, MFS SERIES TRUST IX, MFS :  
 SERIES TRUST X, MFS SERIES TRUST XI, SUN :  
 LIFE FINANCIAL, INC., JOHN DOES 1-100, and :  
 ALL DEFENDANTS, :

Defendants. :

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DANIELLE ADAMS and  
DEAN DELLAVENTURA, Individually, and on  
Behalf of All Others Similarly Situated,

Plaintiff,

vs.

MFS CAPITAL OPPORTUNITIES FUND, MFS  
CORE GROWTH FUND, MFS LARGE CAP  
GROWTH FUND, MFS MANAGED SECTORS  
FUND, MFS MID CAP GROWTH FUND, MFS  
NEW DISCOVERY FUND, MFS NEW  
ENDEAVOR FUND, MFS RESEARCH FUND,  
MFS STRATEGIC GROWTH FUND, MFS  
TECHNOLOGY FUND, MASSACHUSETTS  
INVESTORS GROWTH STOCK, MFS MID CAP  
VALUE FUND, MFS RESEARCH GROWTH  
AND INCOME FUND, MFS TOTAL RETURN  
FUND, MFS UNION STANDARD EQUITY FUND,  
MFS UTILITIES FUND, MFS VALUE FUND,  
MASSACHUSETTS INVESTORS TRUST, MFS  
AGGRESSIVE GROWTH ALLOCATION FUND,  
MFS CONSERVATIVE ALLOCATION FUND,  
MFS MODERATE ALLOCATION FUND, MFS  
BOND FUND, MFS EMERGING MARKETS  
DEBT FUND, MFS GOVERNMENTAL  
LIMITED MATURITY FUND, MFS  
GOVERNMENT MORTGAGE FUND, MFS  
GOVERNMENT SECURITIES FUND, MFS  
HIGH INCOME FUND, MFS HIGH YIELD  
OPPORTUNITIES FUND, BOND FUND, MFS  
LIMITED MATURITY FUND, MFS RESEARCH  
BOND FUND, MFS STRATEGIC INCOME FUND,  
MFS ALABAMA MUNICIPAL BOND FUND,  
MFS ARKANSAS MUNICIPAL BOND FUND,  
MFS CALIFORNIA MUNICIPAL BOND FUND,  
MFS FLORIDA MUNICIPAL BOND FUND, MFS  
GEORGIA MUNICIPAL BOND FUND, MFS

Civ. No. 03 CV 12536 (WGY)

MARYLAND MUNICIPAL BOND FUND, MFS :  
 MASSACHUSETTS MUNICIPAL BOND FUND, :  
 MFS MISSISSIPPI MUNICIPAL BOND FUND, :  
 MFS MUNICIPAL BOND FUND, MFS :  
 MUNICIPAL LIMITED MATURITY FUND, :  
 MFS NEW YORK MUNICIPAL BOND FUND, :  
 MFS NORTH CAROLINA MUNICIPAL BOND :  
 FUND, MFS PENNSYLVANIA MUNICIPAL :  
 BOND FUND, MFS SOUTH CAROLINA :  
 MUNICIPAL BOND FUND, MFS TENNESSEE :  
 MUNICIPAL BOND FUND, MFS VIRGINIA :  
 MUNICIPAL BOND FUND, MFS WEST :  
 VIRGINIA MUNICIPAL BOND FUND, MFS :  
 EMERGING MARKETS EQUITY FUND, MFS :  
 GLOBAL EQUITY FUND, MFS GLOBAL :  
 GROWTH FUND, MFS GLOBAL TOTAL :  
 RETURN FUND, MFS INTERNATIONAL :  
 GROWTH FUND, MFS INTERNATIONAL :  
 NEW DISCOVERY FUND, MFS :  
 INTERNATIONAL VALUE FUND, MFS :  
 RESEARCH INTERNATIONAL FUND, MFS :  
 CASH RESERVE FUND, MFS GOVERNMENT :  
 MONEY MARKET FUND, MFS MONEY :  
 MARKET FUND, MFS MUNICIPAL SERIES :  
 TRUST, MFS SERIES TRUST I, MFS SERIES :  
 TRUST II, MFS SERIES TRUST III, MFS SERIES :  
 TRUST IV, MFS SERIES TRUST V, MFS SERIES :  
 TRUST VI, MFS SERIES TRUST VII, MFS SERIES :  
 TRUST VIII, MFS SERIES TRUST IX, MFS :  
 SERIES TRUST X, MFS SERIES TRUST XI, SUN :  
 LIFE FINANCIAL, INC., MASSACHUSETTS :  
 FINANCIAL SERVICES COMPANY DBA MFS :  
 INVESTMENT MANAGEMENT, and JOHN DOES :  
 1-100 :

Defendants. :

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:  
STEVEN GREENBERG, on Behalf of Himself and :  
All Others Similarly Situated, :  
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Plaintiff, : Civ. No. 03 CV 12545 (WGY)  
:  
vs. :  
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MASSACHUSETTS FINANCIAL SERVICES :  
COMPANY, MFS SERIES TRUST I, MFS SERIES :  
TRUST II, MFS SERIES TRUST III, MFS SERIES :  
TRUST IV, MFS SERIES TRUST V, MFS SERIES :  
TRUST VI, MFS SERIES TRUST VII, MFS SERIES :  
TRUST VIII, MFS SERIES TRUST IX, MFS :  
SERIES TRUST X, and MFS SERIES TRUST XI, :  
:  
Defendants. :  
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JACOB ELEPHANT, on Behalf of Himself and  
All Others Similarly Situated,  
  
Plaintiff,  
  
vs.  
  
MASSACHUSETTS FINANCIAL SERVICES  
COMPANY, MFS INVESTMENT  
MANAGEMENT, SUN LIFE FINANCIAL, INC.,  
MFS SERIES TRUST I, MFS SERIES TRUST II,  
MFS SERIES TRUST III, MFS SERIES TRUST IV,  
MFS SERIES TRUST V, MFS SERIES TRUST VI,  
MFS SERIES TRUST VII, MFS SERIES TRUST  
VIII, MFS SERIES TRUST IX, MFS SERIES  
TRUST X, MFS SERIES TRUST XI, MFS  
CAPITAL OPPORTUNITIES FUND, MFS CORE  
GROWTH FUND, MFS LARGE CAP GROWTH  
FUND, MFS MANAGED SECTORS FUND, MFS  
MID CAP GROWTH FUND, MFS NEW  
DISCOVERY FUND, MFS NEW ENDEAVOR  
FUND, MFS RESEARCH FUND, MFS  
STRATEGIC GROWTH FUND, MFS  
TECHNOLOGY FUND, MASSACHUSETTS  
INVESTORS GROWTH STOCK, MFS MID CAP  
VALUE FUND, MFS RESEARCH GROWTH  
AND INCOME FUND, MFS TOTAL RETURN  
FUND, MFS UNION STANDARD EQUITY FUND,  
MFS UTILITIES FUND, MFS VALUE FUND,  
MASSACHUSETTS INVESTORS TRUST, MFS  
AGGRESSIVE GROWTH ALLOCATION FUND,  
MFS CONSERVATIVE ALLOCATION FUND,  
MFS MODERATE ALLOCATION FUND, MFS  
BOND FUND, MFS EMERGING MARKETS  
DEBT FUND, MFS GOVERNMENTAL  
LIMITED MATURITY FUND, MFS  
GOVERNMENT MORTGAGE FUND, MFS  
GOVERNMENT SECURITIES FUND, MFS

Civ. No. 03 CV 12570 (WGY)



HIGH INCOME FUND, MFS HIGH YIELD  
 OPPORTUNITIES FUND, BOND FUND, MFS  
 LIMITED MATURITY FUND, MFS RESEARCH  
 BOND FUND, MFS STRATEGIC INCOME FUND,  
 MFS ALABAMA MUNICIPAL BOND FUND,  
 MFS ARKANSAS MUNICIPAL BOND FUND,  
 MFS CALIFORNIA MUNICIPAL BOND FUND,  
 MFS FLORIDA MUNICIPAL BOND FUND, MFS  
 GEORGIA MUNICIPAL BOND FUND, MFS  
 MARYLAND MUNICIPAL BOND FUND, MFS  
 MASSACHUSETTS MUNICIPAL BOND FUND,  
 MFS MISSISSIPPI MUNICIPAL BOND FUND,  
 MFS MUNICIPAL BOND FUND, MFS  
 MUNICIPAL LIMITED MATURITY FUND,  
 MFS NEW YORK MUNICIPAL BOND FUND,  
 MFS NORTH CAROLINA MUNICIPAL BOND  
 FUND, MFS PENNSYLVANIA MUNICIPAL  
 BOND FUND, MFS SOUTH CAROLINA  
 MUNICIPAL BOND FUND, MFS TENNESSEE  
 MUNICIPAL BOND FUND, MFS VIRGINIA  
 MUNICIPAL BOND FUND, MFS WEST  
 VIRGINIA MUNICIPAL BOND FUND, MFS  
 EMERGING MARKETS EQUITY FUND, MFS  
 GLOBAL EQUITY FUND, MFS GLOBAL  
 GROWTH FUND, MFS GLOBAL TOTAL  
 RETURN FUND, MFS INTERNATIONAL  
 GROWTH FUND, MFS INTERNATIONAL  
 NEW DISCOVERY FUND, MFS  
 INTERNATIONAL VALUE FUND, MFS  
 RESEARCH INTERNATIONAL FUND, JOHN  
 DOES 1-100, and MFS FUNDS

Defendants.

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:  
YAKOV BURSTEIN, Individually and on Behalf of :  
All Others Similarly Situated, :  
:  
Plaintiff, : Civ. No. 03 CV 12622 (WGY)  
:  
vs. :  
:  
MFS GLOBAL TELECOMMUNICATIONS FUND, :  
CAPITAL OPPORTUNITIES FUND, MFS CORE :  
GROWTH FUND, MFS LARGE CAP GROWTH :  
FUND, MFS MANAGED SECTORS FUND, MFS :  
MID CAP GROWTH FUND, MFS NEW :  
DISCOVERY FUND, MFS NEW ENDEAVOR :  
FUND, MFS RESEARCH FUND, MFS :  
STRATEGIC GROWTH FUND, MFS :  
TECHNOLOGY FUND, MASSACHUSETTS :  
INVESTORS GROWTH STOCK, MFS MID CAP :  
VALUE FUND, MFS RESEARCH GROWTH :  
AND INCOME FUND, MFS TOTAL RETURN :  
FUND, MFS UNION STANDARD EQUITY FUND, :  
MFS UTILITIES FUND, MFS VALUE FUND, :  
MASSACHUSETTS INVESTORS TRUST, MFS :  
AGGRESSIVE GROWTH ALLOCATION FUND, :  
MFS CONSERVATIVE ALLOCATION FUND, :  
MFS MODERATE ALLOCATION FUND, MFS :  
BOND FUND, MFS EMERGING MARKETS :  
DEBT FUND, MFS GOVERNMENTAL :  
LIMITED MATURITY FUND, MFS :  
GOVERNMENT MORTGAGE FUND, MFS :  
GOVERNMENT SECURITIES FUND, MFS :  
HIGH INCOME FUND, MFS HIGH YIELD :  
OPPORTUNITIES FUND, BOND FUND, MFS :  
LIMITED MATURITY FUND, MFS RESEARCH :  
BOND FUND, MFS STRATEGIC INCOME FUND, :  
MFS ALABAMA MUNICIPAL BOND FUND, :  
MFS ARKANSAS MUNICIPAL BOND FUND, :  
MFS CALIFORNIA MUNICIPAL BOND FUND, :

MFS FLORIDA MUNICIPAL BOND FUND, MFS  
GEORGIA MUNICIPAL BOND FUND, MFS  
MARYLAND MUNICIPAL BOND FUND, MFS  
MASSACHUSETTS MUNICIPAL BOND FUND,  
MFS MISSISSIPPI MUNICIPAL BOND FUND,  
MFS MUNICIPAL BOND FUND, MFS  
MUNICIPAL LIMITED MATURITY FUND,  
MFS NEW YORK MUNICIPAL BOND FUND,  
MFS NORTH CAROLINA MUNICIPAL BOND  
FUND, MFS PENNSYLVANIA MUNICIPAL  
BOND FUND, MFS SOUTH CAROLINA  
MUNICIPAL BOND FUND, MFS TENNESSEE  
MUNICIPAL BOND FUND, MFS VIRGINIA  
MUNICIPAL BOND FUND, MFS WEST  
VIRGINIA MUNICIPAL BOND FUND, MFS  
EMERGING MARKETS EQUITY FUND, MFS  
GLOBAL EQUITY FUND, MFS GLOBAL  
GROWTH FUND, MFS GLOBAL TOTAL  
RETURN FUND, MFS INTERNATIONAL  
GROWTH FUND, MFS INTERNATIONAL  
NEW DISCOVERY FUND, MFS  
INTERNATIONAL VALUE FUND, MFS  
RESEARCH INTERNATIONAL FUND, MFS  
CASH RESERVE FUND, MFS GOVERNMENT  
MONEY MARKET FUND, MFS  
GOVERNMENT MONEY MARKET FUND, MFS  
FUNDS, MFS MUNICIPAL SERIES TRUST,  
MFS SERIES TRUST I, MFS SERIES TRUST II,  
MFS SERIES TRUST III, MFS SERIES TRUST IV,  
MFS SERIES TRUST V, MFS SERIES TRUST VII,  
MFS SERIES TRUST VIII, MFS SERIES TRUST  
IX, MFS SERIES TRUST X, MFS SERIES TRUST  
XI, MFS FUND REGISTRANTS, SUN LIFE  
FINANCIAL, INC., MASSACHUSETTS  
FINANCIAL SERVICES COMPANY DBA MFS  
INVESTMENT MANAGEMENT, JOHN DOES  
1-100, MFS and SERIES TRUST VI,

Defendants.

X

David Pastor, declares, under penalty of perjury:

1. I am a member of Gilman and Pastor, LLP. I submit this Declaration in support of the motion of Robert K. Willms for consolidation, appointment as Lead Plaintiff and for approval of selection of Lead and Liaison Counsel.

2. Attached hereto as Exhibit A is a true and accurate copy of the notice published by plaintiff in the action entitled Bruce Riggs v. Massachusetts Financial Services Company, et al., 03-cv-12500 (WGY) (the "Riggs Action") on PR Newswire, a national, business-oriented newswire service, on December 11, 2003.


3. Attached hereto as Exhibit B is a true and accurate copy of a chart presenting the transactions in the subject securities of Robert K. Willms.

4. Attached hereto as Exhibit C is the certification of Robert K. Willms.

5. Attached hereto as Exhibit D is a true copy of the firm resume of Cauley Geller Bowman & Rudman LLP.

6. Attached hereto as Exhibit E is a true copy of the firm resume of Gilman and Pastor, LLP.

Dated: February 9, 2004

  
David Pastor

## **EXHIBIT A**

PRN Shareholder Class Action Filed Against Massachusetts Financial  
Dec 11 2003 13:20

Services

Company, MFS Investment Management and the MFS Family of Mutual Funds by the  
Law Firm of Schiffrin & Barroway, LLP

BALA CYNWYD, Pa., Dec. 11 /PRNewswire/ -- The following statement was  
issued today by the law firm of Schiffrin & Barroway, LLP:

Notice is hereby given that a class action lawsuit was filed in the United  
States District Court for the District of Massachusetts on behalf of all  
purchasers, redeemers and holders of shares of MFS Capital Opportunities Fund  
(Nasdaq: MCOFX), (Nasdaq: MCOBX), (Nasdaq: MCOCX), (Nasdaq: MFCRX), (Nasdaq:  
MCOTX), (Nasdaq: EACOX), (Nasdaq: EBCOX), (Nasdaq: ECCOX), MFS Core Growth  
Fund (Nasdaq: MFCAX), (Nasdaq: MFCBX), (Nasdaq: MFCCX), (Nasdaq: MCFRX),  
(Nasdaq: MCRRX), MFS Emerging Growth Fund (Nasdaq: MEGRX), (Nasdaq: MEGBX),  
(Nasdaq: MFECX), (Nasdaq: MFERX), (Nasdaq: MEGRX), (Nasdaq: EAGRX), (Nasdaq:  
EBEGX), (Nasdaq: ECEGX), and other MFS Mutual Funds, which are managed by  
Massachusetts Financial Services, a subsidiary of Sun Life Financial, Inc.  
(NYSE: SLF) from December 15, 1998 through December 8, 2003, inclusive (the  
"Class Period").

If you wish to discuss this action or have any questions concerning this  
notice or your rights or interests with respect to these matters, please  
contact Schiffrin & Barroway, LLP (Marc A. Topaz, Esq. or Stuart L. Berman,  
Esq.) toll-free at 1-888-299-7706 or 1-610-667-7706, or via e-mail at  
info@sbclasslaw.com.

The following MFS Mutual Funds are subject to this lawsuit:

MFS Capital Opportunities Fund (Nasdaq: MCOFX), (Nasdaq: MCOBX), (Nasdaq:  
MCOCX), (Nasdaq: MFCRX), (Nasdaq: MCOTX), (Nasdaq: EACOX), (Nasdaq:  
EBCOX), (Nasdaq: ECCOX)  
MFS Core Growth Fund (Nasdaq: MFCAX), (Nasdaq: MFCBX), (Nasdaq: MFCCX),  
(Nasdaq: MCFRX), (Nasdaq: MCRRX)  
MFS Emerging Growth Fund (Nasdaq: MEGRX), (Nasdaq: MEGBX), (Nasdaq:  
MFECX), (Nasdaq: MFERX), (Nasdaq: MEGRX), (Nasdaq: EAGRX), (Nasdaq:  
EBEGX), (Nasdaq: ECEGX)  
MFS Growth Opportunities Fund (Nasdaq: MGOFX), (Nasdaq: MGOBX)  
MFS Large Cap Growth Fund (Nasdaq: MCGAX), (Nasdaq: MCGBX)  
MFS Managed Sectors Fund (Nasdaq: MMNSX), (Nasdaq: MSEBX), (Nasdaq:  
MMNCX)  
MFS Mid Cap Growth Fund (Nasdaq: OTCAX), (Nasdaq: OTCBX), (Nasdaq:  
OTCCX), (Nasdaq: MMCRX), (Nasdaq: MCPRX), (Nasdaq: EAMCX), (Nasdaq:  
EBCGX), (Nasdaq: ECGRX)  
MFS New Discovery Fund (Nasdaq: MNDAX), (Nasdaq: MNDBX), (Nasdaq: MNDX),  
(Nasdaq: MFNRX), (Nasdaq: MNDRX), (Nasdaq: EANDX), (Nasdaq: EBNDX),  
(Nasdaq: ECNDX)  
MFS New Endeavor Fund (Nasdaq: MECAX), (Nasdaq: MECBX), (Nasdaq: MECCX),  
(Nasdaq: MNERX), (Nasdaq: MENRX)

PRN Shareholder Class Action Filed Against Massachusetts Financial  
Dec 11 2003 13:20

MFS Research Fund (Nasdaq: MFRFX), (Nasdaq: MFRBX), (Nasdaq: MFRGX),  
(Nasdaq: MFRRX), (Nasdaq: MSRRX), (Nasdaq: EARFX), (Nasdaq: EBRFX),  
(Nasdaq: ECRFX)  
MFS Strategic Growth Fund (Nasdaq: MFSGX), (Nasdaq: MSBGX), (Nasdaq:  
MFGCX), (Nasdaq: MSGRX), (Nasdaq: MSTRX), (Nasdaq: EASGX), (Nasdaq:  
EBSGX), (Nasdaq: ECSGX)  
MFS Technology Fund (Nasdaq: MTCAX), (Nasdaq: MTCBX), (Nasdaq: MTCCX),  
(Nasdaq: MTQRX), (Nasdaq: MTERX)  
Massachusetts Investors Growth Stock (Nasdaq: MIGFX), (Nasdaq: MIGBX),  
(Nasdaq: MIGDX), (Nasdaq: MIGRX), (Nasdaq: MIRGX), (Nasdaq: EISTX),  
(Nasdaq: EMIVX), (Nasdaq: EMICX)  
MFS Mid Cap Value Fund (Nasdaq: MVCAX), (Nasdaq: MCBVX), (Nasdaq: MVCCX),  
(Nasdaq: MMVRX), (Nasdaq: MCVRX), (Nasdaq: EACVX), (Nasdaq: EBCVX),  
(Nasdaq: ECCVX)  
MFS Research Growth and Income Fund (Nasdaq: MRGAX), (Nasdaq: MRGBX),  
(Nasdaq: MRGCX), (Nasdaq: MGIRX), (Nasdaq: MRERX)  
MFS Strategic Value Fund (Nasdaq: MSVTX), (Nasdaq: MSVCX), (Nasdaq: MQSVX),  
(Nasdaq: MSVRX), (Nasdaq: MVSX), (Nasdaq: EASVX), (Nasdaq: EBSVX),  
(Nasdaq: ECSVX)  
MFS Total Return Fund (Nasdaq: MSFRX), (Nasdaq: MTRBX), (Nasdaq: MTRCX),  
(Nasdaq: MFTRX), (Nasdaq: MTRRX), (Nasdaq: EATRX), (Nasdaq: EBTRX),  
(Nasdaq: ECTRX)  
MFS Union Standard Equity Fund (Nasdaq: MUEAX), (Nasdaq: MUSBX), (Nasdaq:  
MUECX)  
MFS Utilities Fund (Nasdaq: MMUFX), (Nasdaq: MMUBX), (Nasdaq: MMUCX),  
(Nasdaq: MMURX), (Nasdaq: MURRX)  
MFS Value Fund (Nasdaq: MEIAX), (Nasdaq: MFEBCX), (Nasdaq: MEICX),  
(Nasdaq: MFVRX), (Nasdaq: MVRX), (Nasdaq: EAVLX), (Nasdaq: EBVLX),  
(Nasdaq: ECVLX)  
Massachusetts Investors Trust (Nasdaq: MITTX), (Nasdaq: MITBX), (Nasdaq:  
MITCX), (Nasdaq: MITRX), (Nasdaq: MIRTX), (Nasdaq: EAMTX), (Nasdaq:  
EBMTX), (Nasdaq: ECITX)  
MFS Aggressive Growth Allocation Fund (Nasdaq: MAAGX), (Nasdaq: MBAGX),  
(Nasdaq: MCAGX), (Nasdaq: MAARX), (Nasdaq: MAWAX), (Nasdaq: EAGTX),  
(Nasdaq: EBAAX), (Nasdaq: ECAAX)  
MFS Conservative Allocation Fund (Nasdaq: MACFX), (Nasdaq: MACBX),  
(Nasdaq: MACVX), (Nasdaq: MACRX), (Nasdaq: MCARX), (Nasdaq: ECLAX),  
(Nasdaq: EBCAX), (Nasdaq: ECACX)  
MFS Growth Allocation Fund (Nasdaq: MAGWX), (Nasdaq: MBGWX), (Nasdaq:  
MCGWX), (Nasdaq: MGARX), (Nasdaq: MGALX), (Nasdaq: EAGWX), (Nasdaq:  
EBGWX), (Nasdaq: ECGWX)  
MFS Moderate Allocation Fund (Nasdaq: MAMAX), (Nasdaq: MMABX), (Nasdaq:  
MMACX), (Nasdaq: MAMRX), (Nasdaq: MARRX), (Nasdaq: EAMDX), (Nasdaq:  
EBMDX), (Nasdaq: EMAX)  
MFS Bond Fund (Nasdaq: MFBFX), (Nasdaq: MFBX), (Nasdaq: MFBCX), (Nasdaq:  
MFBRX), (Nasdaq: MBRRX), (Nasdaq: EABDX), (Nasdaq: EBBDX), (Nasdaq:  
ECBDX)

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MFS Emerging Markets Debt Fund (Nasdaq: MEDAX), (Nasdaq: MEDBX), (Nasdaq: MEDCX)  
MFS Government Limited Maturity Fund (Nasdaq: MGLFX), (Nasdaq: MGLBX), (Nasdaq: MGLCX)  
MFS Government Mortgage Fund (Nasdaq: MGMTX), (Nasdaq: MGTX)  
MFS Government Securities Fund (Nasdaq: MFGSX), (Nasdaq: MFGBX), (Nasdaq: MFGDX), (Nasdaq: MGSRX), (Nasdaq: MGV SX), (Nasdaq: EAGSX), (Nasdaq: EBG SX), (Nasdaq: ECGSX)  
MFS High Income Fund (Nasdaq: MHITX), (Nasdaq: MHIBX), (Nasdaq: MHICX), (Nasdaq: EAHIX), (Nasdaq: EMHBX), (Nasdaq: EMHCX) (Nasdaq: MHIIX), (Nasdaq: MHIRX)  
MFS High Yield Opportunities Fund (Nasdaq: MHOAX), (Nasdaq: MHOBX), (Nasdaq: MHOCX), (Nasdaq: MHOIX)  
MFS Intermediate Investment Grade Bond Fund (Nasdaq: MGBFX), (Nasdaq: MGBVX), (Nasdaq: MGBCX), (Nasdaq: MGBEX), (Nasdaq: MIBRX)  
MFS Limited Maturity Fund (Nasdaq: MQLFX) (Nasdaq: MQLBX), (Nasdaq: MQLCX), (Nasdaq: EALMX), (Nasdaq: EBLMX), (Nasdaq: ELDCX), (Nasdaq: MLDRX)  
MFS Research Bond Fund (Nasdaq: MRBFX), (Nasdaq: MRBBX), (Nasdaq: MRBCX), (Nasdaq: EARBX), (Nasdaq: EBRBX), (Nasdaq: ECRBX), (Nasdaq: MRBIX), (Nasdaq: MRBRX)  
MFS Strategic Income Fund (Nasdaq: MFIOX), (Nasdaq: MIOBX), (Nasdaq: MIOCX), (Nasdaq: MFIIX)  
MFS Alabama Municipal Bond Fund (Nasdaq: MFALX), (Nasdaq: MBABX)  
MFS Arkansas Municipal Bond Fund (Nasdaq: MFARX), (Nasdaq: MBARX)  
MFS California Municipal Bond Fund (Nasdaq: MCFTX), (Nasdaq: MBCAX), (Nasdaq: MCCAX)  
MFS Florida Municipal Bond Fund (Nasdaq: MFFLX), (Nasdaq: MBFLX)  
MFS Georgia Municipal Bond Fund (Nasdaq: MMGAX), (Nasdaq: MBGAX)  
MFS Maryland Municipal Bond Fund (Nasdaq: MFSMX), (Nasdaq: MBMDX)  
MFS Massachusetts Municipal Bond Fund (Nasdaq: MFSSX), (Nasdaq: MBMAX)  
MFS Mississippi Municipal Bond Fund (Nasdaq: MISSX), (Nasdaq: MBMSX),  
MFS Municipal Bond Fund (Nasdaq: MMBFX), (Nasdaq: MMBBX)  
MFS Municipal Limited Maturity Fund (Nasdaq: MTLFX), (Nasdaq: MTLBX), (Nasdaq: MTLCX)  
MFS New York Municipal Bond Fund (Nasdaq: MSNYX), (Nasdaq: MBNYX), (Nasdaq: MCNYX)  
MFS North Carolina Municipal Bond Fund (Nasdaq: MSNCX), (Nasdaq: MBNCX), (Nasdaq: MCNCX)  
MFS Pennsylvania Municipal Bond Fund (Nasdaq: MFPAX), (Nasdaq: MBPAX)  
MFS South Carolina Municipal Bond Fund (Nasdaq: MFSCX), (Nasdaq: MBSCX)  
MFS Tennessee Municipal Bond Fund (Nasdaq: MSTNX), (Nasdaq: MBTNX)  
MFS Virginia Municipal Bond Fund (Nasdaq: MSVAX), (Nasdaq: MBVAX), (Nasdaq: MVACX)  
MFS West Virginia Municipal Bond Fund (Nasdaq: MFWVX), (Nasdaq: MBWVX)  
MFS Emerging Markets Equity Fund (Nasdaq: MEMAX), (Nasdaq: MEMBX), (Nasdaq: MEMCX), (Nasdaq: MEMIX)



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MFS Global Equity Fund (Nasdaq: MWEFX), (Nasdaq: MWEBX), (Nasdaq: MWEEX),  
(Nasdaq: MWEIX), (Nasdaq: MGERX)  
MFS Global Growth Fund (Nasdaq: MWOFX), (Nasdaq: MWOBX), (Nasdaq: MWOCX),  
(Nasdaq: MWOIX), (Nasdaq: MGLRX)  
MFS Global Total Return Fund (Nasdaq: MFWTX), (Nasdaq: MFWBX), (Nasdaq:  
MFWCX), (Nasdaq: MFWIX), (Nasdaq: MGRRX)  
MFS International Growth Fund (Nasdaq: MGRAX), (Nasdaq: MGRBX), (Nasdaq:  
MGRCX), (Nasdaq: MQGIX)  
MFS International New Discovery Fund (Nasdaq: MIDAX), (Nasdaq: MIDBX),  
(Nasdaq: MIDCX), (Nasdaq: EAIDX), (Nasdaq: EBIDX), (Nasdaq: ECIDX),  
(Nasdaq: MWNIX), (Nasdaq: MINRX)  
MFS International Value Fund (Nasdaq: MGIAX), (Nasdaq: MGIBX), (Nasdaq:  
MGICX), (Nasdaq: MINIX)  
MFS Research International Fund (Nasdaq: MRSAX), (Nasdaq: MRIBX),  
(Nasdaq: MRICX), (Nasdaq: EARSX), (Nasdaq: EBRIX), (Nasdaq: ECRIX),  
(Nasdaq: MRSIX), (Nasdaq: MRIRX)

The complaint charges Massachusetts Financial Services Company, MFS Investment Management, Sun Life Financial, Inc. MFS Series Trust I, MFS Series Trust II, MFS Series Trust III, MFS Series Trust IV, MFS Series Trust V, MFS Series Trust VI, MFS Series Trust VII, MFS Series Trust VIII, MFS Series Trust IX, MFS Series Trust X, MFS Series Trust XI, MFS Mutual Funds, and the Doe Defendants with violations of the Securities Act of 1933 (the "Securities Act"), the Securities Exchange Act of 1934 (the "Exchange Act"), the Investment Company Act of 1940 (the "Investment Company Act"), and for common law breach of fiduciary duties. The Complaint alleges that during the Class Period the defendants engaged in illegal and improper trading practices, in concert with certain institutional traders, which caused financial injury to the shareholders of the MFS Mutual Funds. According to the Complaint, the Defendants surreptitiously permitted certain favored investors, including the Doe Defendants, to illegally engage in "timing" of the MFS Mutual Funds whereby these favored investors were permitted to conduct short-term, "in and out" trading of mutual fund shares, despite explicit restrictions on such activity in the MFS Mutual Funds' prospectuses.

Plaintiff seeks to recover damages on behalf of class members and is represented by the law firm of Schiffrin & Barroway, which prosecutes class actions in both state and federal courts throughout the country. Schiffrin & Barroway is a driving force behind corporate governance reform, and has recovered in excess of a billion dollars on behalf of institutional and high net worth individual investors. For more information about Schiffrin & Barroway, or to sign up to participate in this action online, please visit <http://www.sbclasslaw.com>.

If you are a member of the class described above, you may, not later than February 9, 2004, move the Court to serve as lead plaintiff of the class, if you so choose. In order to serve as lead plaintiff, however, you must meet certain legal requirements. You may retain Schiffrin & Barroway, or other counsel of your choice, to serve as your counsel in this action.

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CONTACT: Schiffrin & Barroway, LLP  
Marc A. Topaz, Esq.  
Stuart L. Berman, Esq.  
Three Bala Plaza East, Suite 400, Bala Cynwyd, PA 19004  
1-888-299-7706 (toll-free) or 1-610-667-7706  
Or by e-mail at info@sbclasslaw.com

SOURCE Schiffrin & Barroway, LLP

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12/11/2003

/CONTACT: Marc A. Topaz, Esq. or Stuart L. Berman, Esq. of Schiffrin &  
Barroway, +1-888-299-7706 (toll-free) or +1-610-667-7706, or  
info@sbclasslaw.com/

/Web site: <http://www.sbclasslaw.com> /  
(SLF)

CO: Schiffrin & Barroway, LLP; Massachusetts Financial Services; Sun Life  
Financial, Inc.

ST: Pennsylvania, Massachusetts

IN: INS MFD FIN

SU: LAW

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## **EXHIBIT B**

## MFS Mutual Fund Holdings - Robert K. Willms

Account #	Fund	Date of Purchase	# Shares	Price/share	Extension	Total by Fund
UW-03603	MCGAX	12/31/01	10916.612	\$12.280	\$134,056.00	\$134,056.00
UW-00653	MCOFX	12/07/99	3018.783	\$22.363	\$67,509.04	
UW-00654	MCOFX	12/07/99	221.377	\$22.378	\$4,953.97	
UW-00653	MCOFX	12/31/99	521.537	\$19.200	\$10,013.51	
UW-00654	MCOFX	12/31/99	38.246	\$19.200	\$734.32	
UW-00653	MCOFX	12/18/00	204.514	\$17.960	\$3,673.07	
UW-00654	MCOFX	12/18/00	14.988	\$17.960	\$269.18	
UW-00654	MCOFX	12/18/00	14.131	\$17.961	\$253.81	\$87,406.92
UW-03603	MEIAX	12/31/01	5976.313	\$19.420	\$116,060.00	
UW-03603	MEIAX	01/31/02	0.025	\$19.200	\$0.48	
UW-03603	MEIAX	01/31/02	23.018	\$19.130	\$440.33	
UW-03603	MEIAX	03/26/02	8.142	\$19.790	\$161.13	
UW-03603	MEIAX	06/26/02	13.496	\$18.250	\$246.30	
UW-03603	MEIAX	09/26/02	24.099	\$16.240	\$391.37	
UW-03603	MEIAX	12/23/02	17.863	\$16.920	\$302.24	
UW-03603	MEIAX	03/26/03	22.299	\$15.770	\$351.66	
UW-03603	MEIAX	06/26/03	19.497	\$17.790	\$346.85	
UW-03603	MEIAX	09/26/03	18.768	\$17.890	\$335.76	
UW-03603	MEIAX	12/02/03	16.860	\$19.250	\$324.56	\$118,960.68

## MFS Mutual Fund Holdings - Robert K. Willms

Account #	Fund	Date of Purchase	# Shares	Price/share	Extension	Total by Fund
UW-03556	MFE GX	12/06/99	453.686	\$58.199	\$26,404.07	
UW-00653	MFE GX	12/07/99	1158.997	\$58.247	\$67,508.10	
UW-00654	MFE GX	12/07/99	84.993	\$58.270	\$4,952.54	
UW-03555	MFE GX	12/08/99	486.747	\$57.958	\$28,210.88	
UW-03557	MFE GX	12/08/99	638.481	\$57.956	\$37,003.80	
UW-03604	MFE GX	12/08/99	1349.587	\$57.953	\$78,212.62	
UW-03608	MFE GX	12/08/99	124.504	\$57.982	\$7,218.99	
UW-00653	MFE GX	12/31/99	6.025	\$60.191	\$362.65	
UW-00654	MFE GX	12/31/99	0.442	\$60.158	\$26.59	
UW-03555	MFE GX	12/31/99	2.530	\$60.198	\$152.30	
UW-03556	MFE GX	12/31/99	2.358	\$60.204	\$141.96	
UW-03557	MFE GX	12/31/99	3.319	\$60.193	\$199.78	
UW-03604	MFE GX	12/31/99	8.219	\$60.203	\$494.81	
UW-03608	MFE GX	12/31/99	0.647	\$60.216	\$38.96	
UW-00653	MFE GX	12/18/00	127.690	\$46.720	\$5,965.68	
UW-00654	MFE GX	12/18/00	9.364	\$46.719	\$437.48	
UW-03555	MFE GX	12/18/00	53.626	\$46.720	\$2,505.41	
UW-03556	MFE GX	12/18/00	49.984	\$46.720	\$2,335.25	
UW-03557	MFE GX	12/18/00	70.344	\$46.720	\$3,286.47	
UW-03604	MFE GX	12/18/00	169.452	\$46.720	\$7,916.80	
UW-03608	MFE GX	12/18/00	13.717	\$46.720	\$640.86	
UW-03603	MFE GX	11/07/01	1581.278	\$31.620	\$50,000.01	\$324,016.01

## MFS Mutual Fund Holdings - Robert K. Wililms

Account #	Fund	Date of Purchase	# Shares	Price/share	Extension	Total by Fund
UW-03556	MIGFX	12/06/99	1298.574	\$20.330	\$26,400.01	
UW-00653	MIGFX	12/07/99	3331.688	\$20.262	\$67,506.66	
UW-00654	MIGFX	12/07/99	244.324	\$20.276	\$4,953.91	
UW-03603	MIGFX	12/07/99	23.863	\$20.260	\$483.46	
UW-03555	MIGFX	12/08/99	1392.938	\$20.253	\$28,211.17	
UW-03557	MIGFX	12/08/99	1827.160	\$20.252	\$37,003.64	
UW-03604	MIGFX	12/08/99	2977.591	\$20.251	\$60,299.20	
UW-03608	MIGFX	12/08/99	356.296	\$20.261	\$7,218.91	
UW-00653	MIGFX	12/31/99	286.116	\$18.820	\$5,384.70	
UW-00654	MIGFX	12/31/99	20.982	\$18.820	\$394.88	
UW-03555	MIGFX	12/31/99	119.622	\$18.820	\$2,251.29	
UW-03556	MIGFX	12/31/99	111.518	\$18.820	\$2,098.77	
UW-03557	MIGFX	12/31/99	156.911	\$18.820	\$2,953.07	
UW-03603	MIGFX	12/31/99	932.527	\$18.820	\$17,550.16	
UW-03604	MIGFX	12/31/99	388.631	\$18.820	\$7,314.04	
UW-03608	MIGFX	12/31/99	30.597	\$18.820	\$575.84	
UW-00653	MIGFX	12/18/00	194.171	\$17.170	\$3,333.92	
UW-00654	MIGFX	12/18/00	14.239	\$17.170	\$244.48	
UW-03555	MIGFX	12/18/00	12.405	\$17.170	\$212.99	
UW-03556	MIGFX	12/18/00	70.725	\$17.170	\$1,214.35	
UW-03557	MIGFX	12/18/00	81.181	\$17.170	\$1,393.88	
UW-03603	MIGFX	12/18/00	75.681	\$17.170	\$1,299.44	
UW-03604	MIGFX	12/18/00	65.934	\$17.170	\$1,132.09	
UW-03608	MIGFX	12/18/00	106.487	\$17.170	\$1,828.38	
UW-03557	MIGFX	12/18/00	92.772	\$17.170	\$1,592.90	
UW-03603	MIGFX	12/18/00	609.508	\$17.170	\$10,465.25	
UW-03604	MIGFX	12/18/00	531.005	\$17.170	\$9,117.36	
UW-03608	MIGFX	12/18/00	256.038	\$17.170	\$4,396.17	
UW-03555	MIGFX	12/18/00	223.062	\$17.170	\$3,829.97	
UW-03556	MIGFX	12/18/00	20.765	\$17.170	\$356.54	
UW-03557	MIGFX	12/18/00	18.090	\$17.170	\$310.61	
UW-03603	MIGFX	06/27/01	1081.993	\$14.050	\$15,202.00	\$326,530.03

## MFS Mutual Fund Holdings - Robert K. Willms

Account #	Fund	Date of Purchase	# Shares	Price/share	Extension	Total by Fund
UW-03603	MITTX	12/07/99	3742.188	\$20.480	\$76,640.01	
UW-03604	MITTX	12/08/99	3777.623	\$20.461	\$77,293.94	
UW-03603	MITTX	12/31/99	267.313	\$20.160	\$5,389.03	
UW-03604	MITTX	12/31/99	111.457	\$20.160	\$2,246.97	
UW-03603	MITTX	12/04/00	92.271	\$21.031	\$1,940.55	
UW-03603	MITTX	12/04/00	379.902	\$19.810	\$7,525.86	
UW-03604	MITTX	12/04/00	36.952	\$21.037	\$777.36	
UW-03604	MITTX	12/04/00	146.590	\$19.810	\$2,903.95	
UW-03603	MITTX	03/28/01	95.729	\$17.150	\$1,641.75	
UW-03604	MITTX	03/28/01	36.939	\$17.150	\$633.50	
UW-03603	MITTX	12/04/01	34.998	\$16.540	\$578.87	
UW-03604	MITTX	12/04/01	13.111	\$16.540	\$216.86	
UW-03603	MITTX	03/26/02	3.346	\$16.500	\$55.21	
UW-03604	MITTX	03/26/02	3.068	\$16.499	\$50.62	
UW-03603	MITTX	12/03/02	18.974	\$13.380	\$253.87	
UW-03604	MITTX	12/03/02	17.145	\$13.380	\$229.40	
UW-03603	MITTX	03/26/03	7.729	\$12.601	\$97.39	
UW-03604	MITTX	03/26/03	6.983	\$12.601	\$87.99	
UW-03603	MITTX	12/02/03	21.694	\$14.980	\$324.98	
UW-03604	MITTX	12/02/03	19.392	\$14.980	\$290.49	\$179,178.61
UW-00653	MNDAX	03/06/00	1276.166	\$27.233	\$34,753.83	
UW-00653	MNDAX	12/11/00	45.545	\$18.050	\$822.09	
UW-00653	MNDAX	12/10/01	0.021	\$16.667	\$0.35	\$35,576.27
UW-00653	MRSAX	03/06/00	1999.425	\$17.380	\$34,750.01	
UW-00653	MRSAX	12/18/00	21.011	\$14.270	\$299.83	
UW-00653	MRSAX	12/18/00	48.272	\$14.270	\$688.84	\$35,738.67
UW-03603	OTCAX	12/07/00	13733.313	\$13.520	\$185,674.39	
UW-03555	OTCAX	06/27/01	1204.596	\$12.620	\$15,202.00	
UW-03603	OTCAX	11/07/01	4980.317	\$10.080	\$50,000.00	
UW-03555	OTCAX	01/31/02	0.002	\$10.000	\$0.02	
UW-03555	OTCAX	01/31/02	19.487	\$9.780	\$190.58	
UW-03603	OTCAX	01/31/02	302.405	\$9.780	\$2,957.52	\$254,024.51
<b>TOTAL</b>			<b>76,883.916</b>			<b>\$1,495,487.69</b>

## **EXHIBIT C**



Caulley Geller Bowman & Rudman, LLP  
P.O. Box 25438, Little Rock, AR 72221-5438  
(501) 312-8500; (501) 312-8505 Facsimile  
info@caulleygeller.com

**CERTIFICATION OF PLAINTIFF PURSUANT TO FEDERAL SECURITIES LAWS**

ROBERT K. WILLMS ("Plaintiff"), declares as to the claims asserted, or to be asserted, under the federal securities laws, that:

1. Plaintiff has reviewed the MFS [mutual fund company name] complaint.
2. Plaintiff did not purchase any common stock/securities that are the subject of this action at the direction of Plaintiff's counsel or in order to participate in any private action under the federal securities laws.
3. Plaintiff is willing to serve as a representative party on behalf of the class, including providing testimony at deposition and trial, if necessary. I understand that this is not a claim form, and that my ability to share in any recovery as a member of the class is not dependent upon execution of this Plaintiff Certification.
4. BEFORE the start of the Class Period, Plaintiff held 0 shares MFS [mutual fund company name] mutual funds.
5. The following includes all of Plaintiff's transactions DURING the Class Period specified in the complaint for the mutual fund(s) that is/ are the subject of this action:

FUND NAME / TICKER SYMBOL	TRANSACTION (Purchase, Sale)	QUANTITY	TRADE DATE	PRICE PER SHARE/SECURITY
(SEE ATTACHED)				

Please list additional transactions on a separate sheet if necessary.

6. Plaintiff's shares were acquired (check all that apply): ☒ IRA ☐ Employer-sponsored plan (401K, 403B, etc.)  
☒ Non-retirement account ☐ Merger/acquisition ☒ Other (describe): Charitable Remainder Trust
7. Plaintiff has not sought to serve or served as a representative party for a class in an action filed under the federal securities laws within the past three years, unless otherwise stated in the space below:
8. Plaintiff will not accept any payment for serving as a representative party on behalf of the class beyond Plaintiff's pro rata share of any recovery, except such reasonable costs and expenses (including lost wages) directly relating to the representation of the class as ordered or approved by the court.

I declare under penalty of perjury that the foregoing is true and correct. Executed this 7<sup>th</sup> day of January, 2004.

[Signature]  
SIGNATURE

Name (print): ROBERT K WILLMS